Welcome to Oxfordshire Insight

The Oxford and Oxfordshire City Deal, signed on January 30th 2014, promises £1.2bn investment in Oxfordshire and the creation of 19,000 new jobs.

The Oxfordshire Local Economic Partnership has been awarded £20 million through the European Structural Investment fund.

The Oxfordshire Strategic Economic Plan (SEP) (to be submitted to Government at the end of March) sets out the vision and strategic objectives for the county’s economy growth and is the County’s bid for a £240 million share of the Government’s local Growth Fund.

This month, Oxfordshire Insight presents the figures behind the economic headlines, and sets out how the county fares in the newly published 2013 UK Competitiveness Index.

Also in this month’s newsletter

- Headlines from the 2014 Joint Strategic Needs Assessment.
- New 2011 Census data suggests there are up to 3,000 concealed families living in the county.
- Numbers of passengers and journeys by train and bus increase.
- As the county dries out after the flooding in January and February, we look back at the events in numbers.

Did you know

Effective use of data can increase productivity.

Research published by Nesta in March 2014 showed that private sector companies using data effectively were 8% more productive than those which did not, increasing profits by £3,180 per employee.

Find out more at http://www.nesta.org.uk/publications/briefing-inside-datavores

Source: Oxford and Oxfordshire City Deal

To find out more about the data featured in the newsletters, as well as other facts and figures about Oxfordshire, visit our website at www.oxfordshire.gov.uk/insight

To contact us with your data queries, email observatory@oxfordshire.gov.uk

To include items in future newsletters, or suggest items you would like to see, please email inga.doherty@oxfordshire.gov.uk.
According to the UK Competitiveness Index 2013, Oxford City is ranked as the 8th most competitive of 45 cities across the UK, down from 6th place in the 2010 index. Cambridge leads the table, up from 4th place in 2010.

The Oxfordshire Local Enterprise Partnership area ranks as the 6th most competitive out of 39 LEPs, unchanged from 2010.

All Oxfordshire districts rank in the top 20% nationally.

The UK Competitiveness Index (UKCI) ranks local authorities and cities against a number of measures which reflect competitiveness. These include productivity, knowledge intensive businesses, business start ups, skills, pay and employment and unemployment rates.

The key factors contributing to Oxfordshire’s competitive economy are outlined below. A more detailed briefing and the UKCI 2013 report are available on Oxfordshire Insight.

1. Productivity

In 2012, Oxfordshire contributed £16.5 billion Gross Value Added (GVA) to the UK economy1. This is a key measure of economic performance that shows the increase in the value of the economy due to the production of goods and services.

At £24,900 per person, Oxfordshire’s GVA is well above the national (England, £21,937) and regional (£22,369) averages. There has been consistent growth from 1997 to 2012, with a slight fall from 2008 to 2009 (figure 1).

---

1 Office for National Statistics, Regional Gross Value Added (Income Approach), December 2013
A recent report for the Oxfordshire Local Enterprise Partnership\(^2\) suggested that an additional £500m in GVA could have been created in the local economy between 1997 and 2011 had Oxfordshire’s GVA grown at the same rate as Cambridgeshire’s. The City Deal aims to unlock this potential.

Figure 1. Gross Value Added per person

Source: Office for National Statistics, December 2013

\[\text{Figure 2. Business start ups and closures in Oxfordshire, 2004 to 2012}\]

Source: ONS, Business Demography

2. A strong knowledge based sector

The contribution of knowledge-based businesses to economic competitiveness is well recognised, and together with the high tech sector is of key importance for Oxfordshire’s economy and the focus of the City Deal.

High tech knowledge intensive services accounted for around 16,000 jobs in Oxfordshire in 2012, high tech manufacturing for a further 4,000.

3. A vibrant business base

Business growth rates at the end of 2013 placed the Oxfordshire Local Enterprise Partnership (LEP) area 20th out of 39 local enterprise partnerships\(^3\).

Importantly, figures from the Office for National Statistics show more businesses started up than closed down during 2011 and 2012, reversing the trend seen in the previous two years (figure 2).

Business survival rates in Oxfordshire are in line with national and regional averages: 94% of enterprises starting up in 2011 were still operating one year later.

\[\text{UKCI 20213, Rank by Knowledge-based business index}\]

<table>
<thead>
<tr>
<th>District</th>
<th>Rank</th>
</tr>
</thead>
<tbody>
<tr>
<td>South Oxfordshire</td>
<td>48</td>
</tr>
<tr>
<td>Oxford</td>
<td>152</td>
</tr>
<tr>
<td>Vale of White Horse</td>
<td>126</td>
</tr>
<tr>
<td>West Oxfordshire</td>
<td>163</td>
</tr>
<tr>
<td>Cherwell</td>
<td>234</td>
</tr>
</tbody>
</table>

\(^2\) SQW, Oxfordshire Innovation Engine

\(^3\) BankSearch consultancy
4. *A skilled workforce*

Almost half of Oxfordshire’s working age residents (47%) are qualified to NVQ4 (degree level) or above (59% in Oxford City). This is significantly above the national average (33%) and the largest proportion of any county authority.

A survey carried out in 2013 found that most respondents identified shortages of scientific and technical skills as a constraint on growth, particularly in the engineering, motorsport and physical science sectors.

The emerging Oxfordshire Skills Strategy aims to address these issues.

5. *Earnings*

The median annual pay for full time employees living in Oxfordshire in 2013 was £29,393, up 1.4% from the previous year and above the national average (£27,375).

On the UKCI 2013, Vale of White Horse is the highest ranked of the Oxfordshire districts on this measure, and is 17th out of the 349 UK local authorities. Although earnings are above average, the cost of living in Oxfordshire is also above average. A recent report from Lloyds Bank shows Oxford is the least affordable place to live in the UK compared to local wages. The average property costs £340,864, 11 times local salaries. See Box 1 for a countywide view.

6. *High employment rates, low unemployment*

Employment rates in Oxfordshire are well above the national average: 78.1% compared with 71.2%. Unemployment rates are correspondingly low at 5.6%.

Census data on economic activity, the labour market and qualifications is now available at a local level. View the data for your local area on the interactive map on the Office for National Statistics website.

For further information on the UK Competitiveness Index and Oxfordshire’s economy, visit [www.oxfordshire.gov.uk/insight](http://www.oxfordshire.gov.uk/insight).

---

4 Office for National Statistics, Annual population survey  
5 SQW, Oxfordshire Innovation Engine  
6 Find out more about the Oxfordshire Skills Strategy and the Oxfordshire Skills Board at: [http://www.oxfordskillsboard.org/](http://www.oxfordskillsboard.org/)  
7 Median income is used to avoid the picture being skewed by individual incomes of very high earners. The average income in 2013 was £35,933.  
8 Source: Annual population survey, January 2014
Box 1  House prices and income

House prices across Oxfordshire are almost nine times higher than median annual earnings, whilst the cost of lower priced houses remains nine times higher than the lowest 25% of earnings.

The City Deal identifies affordable housing as a key barrier to economic growth, and aims to address this issue by accelerating house building in the county and by ensuring that a significant proportion of the new homes are affordable.

The number of dwellings in Oxfordshire increased by 19,000 from 2004/05 to 2012/13. Over the same period, the number of affordable homes increased by 7,380 (including social rent, affordable rent, intermediate rent and affordable home ownership – new builds and acquisitions).
Concealed families

Newly released 2011 Census figures show there are almost 3,000 concealed families in Oxfordshire, just under 2% of all families. A concealed family lives in a household in addition to the primary family. This measure gives a useful indicator of housing demand.

71% of concealed families in Oxfordshire are couples (above the 63% average across England and Wales). Almost 40% are aged between 25 to 34 years, and 30% are over the age of 65 years – likely to be young couples living with their parents or older couples living with an adult child and their family.

29% of concealed families are lone parent families, the majority under the age of 34 years, 30% under 24 years.

JSNA annual report published

Latest analysis of the Joint Strategic Needs Analysis (JSNA) data presents a picture of an increasingly diverse county, which is, in the most part, a relatively healthy and prosperous place to live. However, it is clear that certain areas of the county experience less benign conditions which are associated with poorer health and wellbeing outcomes. These areas tend to be in the more economically deprived parts of South East Oxford and Banbury but include parts of Abingdon, Berinsfield, and Didcot.

The county’s population is growing. This is due to increased inward migration, particularly in the urban hubs of Oxford and Banbury, and the increasing life expectancy of the existing population, particularly in the rural areas of the county. The mini baby boom of the past ten years, which has seen numbers of children increasing year on year, is forecast to level off, stabilising demand for early years provision and schools over the next ten years following a further increase in the immediate future.

The proportion of older people is likely to continue increasing and this will have implications for service demand. Recently, demand for both Children’s and Adult Social care has been increasing at a faster rate than even that which would be expected by population growth, suggesting that previously unmet need is coming forward.

Disability free life expectancy is increasing at a faster rate than life expectancy, meaning that not only are people living longer, in the future they might be expected (at the population level) to be living in good health and free of disability for longer towards the end of their lives. This is particularly true for the male population but will need further monitoring to see if it is a sustained trend, and if so what the implications are.

Data on mortality and morbidity suggest that Oxfordshire residents are less likely than those of the wider region to die early from cancers and circulatory diseases but that the identification of cancers is above the regional rate.

Assessment data for older people accessing Self-Directed Support gives a picture of the kinds of needs and disabilities people have at the point when they access care. Analysis has shown that close to one third of older people on Self-Directed Support have dementia, with the proportion being highest among people in the 80-94 age band. For service users over the age of 95 the most common disabling condition was arthritis.

In line with the growing population, as well as shifts in the way people are accessing them, some services are seeing significant challenges in meeting demand. This can be seen in the increasing demand around delayed transfers of care, the proportion of A&E waits which take more than 4 hours, and the increasing demand for adult and children’s social care.

Feedback from service users has emphasised the importance of giving clients control over their daily lives including their care choices. Consultation feedback has also highlighted the difficulties people find in accessing up to date information and advice on the care options available.

The full report and supporting data can be found on Oxfordshire Insight.
Number of young ‘NEETs’ at four year low

According to the latest data from the OCC Youth Engagement and Opportunities Team, 4.6% of young people in Oxfordshire aged between 16 to 18 years were Not in Education, Employment or Training (NEET) at the end of February 2014. Although a slightly lower figure was recorded the previous month (4.5%), this remains the lowest rate in over four years.

Nationally, 7.6% of young people between the ages of 16-18 years were NEET in the last quarter of 2013, the lowest recorded quarterly rate since this measure was first recorded in 2000.

More than half a million extra rail journeys in 2012/13

Latest figures from the Office of Rail Regulation show there were 16.3 million journeys recorded at the 22 rail stations in the county in 2012/13, 529,272 more than in 2011/12.

6.6 million passengers used Oxford station (up 1.2%) followed by Didcot Parkway station with 3.36 million passengers (up 2.2%).

The number of bus journeys has also increased. Statistics published by the Department for Transport show the number of bus passenger journeys in Oxfordshire has also increased: from 36.3m in 2010/11 to 39.3m in 2011/12, an increase of more than 8%.

And finally …. 

With heavy rainfall, gales and flooding dominating the news – and large areas of the county – throughout most of January and February this year, we look back at some of the numbers.

- 146.9mm of rain was recorded at the Oxford University Radcliffe Meteorological Station during January, making this the wettest month since records began there 247 years ago.

- January 11th was the only rainless day that month.

- Believe it or not January 2014 was also one of the ten sunniest since records began in 1881: over 80 hours compared with the average of 54.

- 21 flood alerts were in place across Oxfordshire on February 12th. 45 roads across the county were closed during the worst of the flooding.

- Businesses are reporting significant losses due to direct impact of flooding but also through loss of business as a result of road closures and diversions around flooded areas. With ongoing repairs to properties and infrastructure, it’ll be some time before we know the full cost of this winter’s flooding.

To find out more about the data featured in the newsletters, as well as other facts and figures about Oxfordshire, visit our website at www.oxfordshire.gov.uk/insight or contact us by email at observatory@oxfordshire.gov.uk.